



THE GLOSS METHOD[®]

The consultative sales framework for helping accounting businesses to maximise the value of their client relationships



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INTRODUCTION

The GLOSS Method™ is a proven, logical framework for successful sales meetings and fee reviews between accountancy firms and their clients. This consultative approach is designed to ensure you're identifying every opportunity, solving your client's greatest problems and delivering maximum value to them.

Developed for GoProposal members, it is now widely recognised in accountancy and bookkeeping businesses around the world as being the most impactful approach to any sales discussion.

So GLOSS stands for...

- Goals
- Location
- Obstacles
- Speed
- Solution

GOALS - WHERE ARE THEY TRYING TO GET TO?

Like any journey, we must first understand where your clients are trying to get to if we are to help them get there. The real magic of this step is to focus on their personal goals first and their business goals second. Ultimately, the only reason they're in business is to get the life that they want, so personal goals should be the initial focus of this conversation.

- What are their personal goals?
- What are their business goals?
- Think 90 days, 1 year and 3 years and ultimately

Questions to inspire them in this section are...

- What would a perfect week look like for you?
- What are some immediate wins that would help you to get closer towards achieving your personal goals?
- What would make this a great year for you and your family?
- What would you ideally like your revenue to be in 12 months time?
- What would success look like for your business after we've been working together for 3 years?
- What's the dream?

An extra thought here is... what goals do you have for THEM? You can impose your goals on them too to help them to be more stormproof, such as 3 month's overheads saved in the bank.



LOCATION - WHERE ARE THEY NOW?

Before you can give anyone directions towards a destination, you must first understand exactly where they are now. This information is critical when it comes to costing the solution you're about to provide and the only way to achieve this effectively is using to use dynamic pricing. Here we are looking for things like revenue, number of staff, number of transactions & debtor days to pinpoint their location and help us arrive at a logical price.

When using dynamic pricing, you'll need the following parameters...

- Industry
- Revenue
- Quality of record keeping (determined by you)
- No. of Staff
- No. of Directors
- No. of transactions
- No. of invoices
- No. of purchase invoices



OBSTACLES - WHAT STANDS IN THEIR WAY?

Now we know where they are and where they're trying to get to, we need to understand the obstacles which stand in their way. These obstacles are normally created out of a lack of one or more resources. Discovering the obstacles, will help to inform the services they need and the exact service levels.

What is preventing them from reaching their goals in terms of...

- Time
- Money
- People
- Knowledge
- Technology



SPEED - HOW FAST DO THEY WANT TO GO?

Before you present your solution to the client, you need to understand how fast they want to go. This speed is dictated by their ambitions and will ensure you're presenting the correct level of service. It also puts an element of onus onto the client to determine their level of investment. If they want to go faster and do less, that's fine, but it will cost them more.

There is a great answer to the question: "How much will it cost?" And that is: "It depends how fast you want to go."

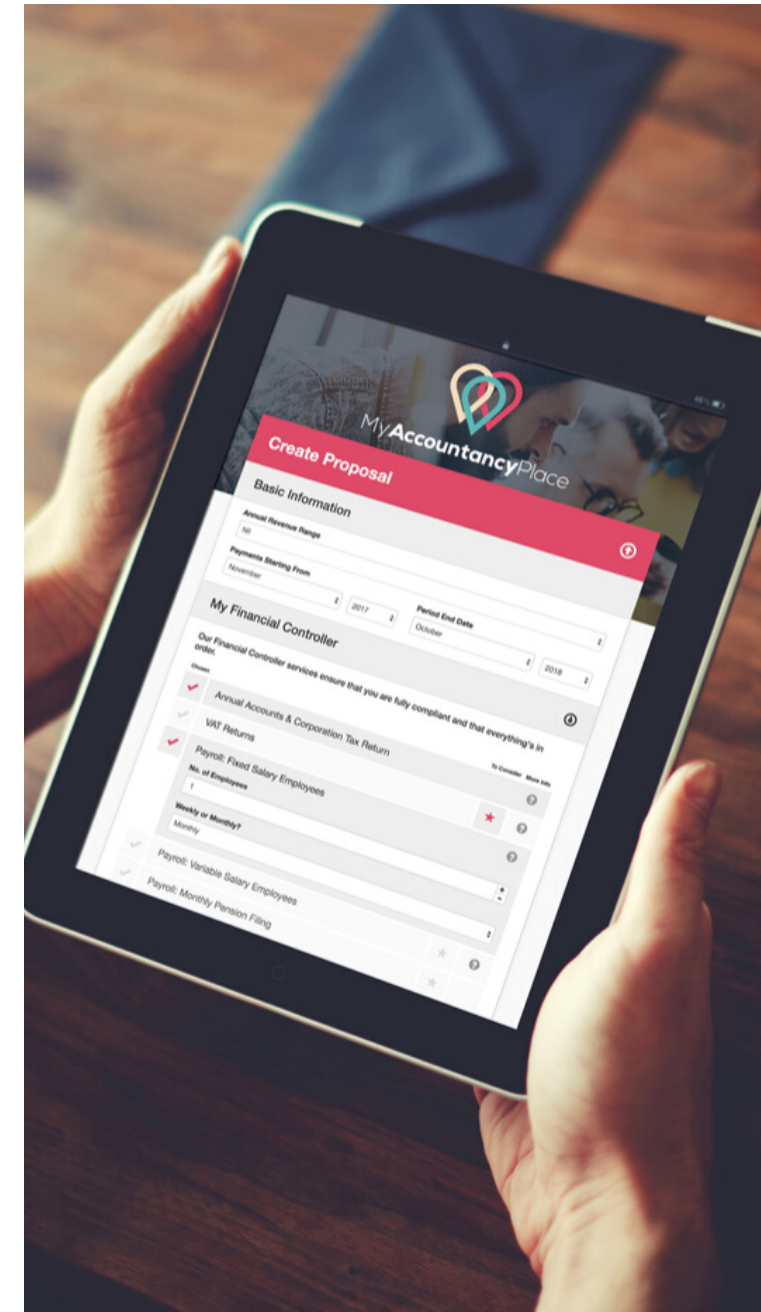
- If you want to go fast, we can do everything for you and free up you and your team completely.
- If you want to go slower, we can do most things for you and train you & your team how to do the rest. We can then support you in those activities moving forwards.
- If you have a lot of time and you want to keep costs down, then you can do most of it yourself, so long as it conforms to OUR standards.



SOLUTION - WHAT IS THE BEST SOLUTION?

After going through this consultative process of knowing where they are, where they want to get to, what's blocking the way and how fast they want to go, you can now present the solution. This will be a combination of services, products, software and training with the associated investment costs. This best solution should be presented efficiently, clearly and confidently.

- Don't give the client too much choice as it's not fair on them.
- You're the trusted adviser. Be confident and be authoritative
- Make no assumptions and just offer them the best solution that you would want, if you were them, knowing what you know.
- "Based on where you are now, where you're trying to get to, the obstacles in your way and the speed you want to go at, this is the best solution we suggest."



GRAPHICS & POSTERS - SHARE WITH YOUR TEAM & CLIENTS

We have devised a series of graphics which you can include in your documentation or print out as posters. This is a great way for you to communicate the value of this process to everyone involved. We have one for your team which is designed to remind them of the nuances of the process and we have 3 client-facing graphics with varying degrees of information, depending on what you want to communicate to them.

How We Maximise the Value We Provide To Our Clients



TEAM: Full Process

How We Maximise the Value We Provide To You



TEAM: Full Description



TEAM: Summaries



TEAM: Titles

How We Maximise the Value We Provide To Our Clients



How We Maximise the Value We Provide To You







For maximum success, the GLOSS Method
should always be used in conjunction with



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